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# Average Cost per Interlibrary Loan Article Request at Western Libraries

Amy Stefany, Meghan Williams and Jennifer McCool – November 20, 2015

## Introduction

Western Libraries faces a budget shortfall that must be addressed before fiscal year's end. The Director of Scholarly Resources and Collections Services has asked the ILL staff to determine the average cost of an ILL article for comparison to subscription cost-per-use data. The comparison will be used to inform discussion regarding possible subscription cuts in the coming fiscal years, and to address the current shortfall.

The following report begins with a general explanation of interlibrary loan at Western, then takes a look at documented strategies used by other libraries to calculate similar averages, and lastly explains the methodology used to come up with our own institutional averages for the past three fiscal years.

## Interlibrary Loan Requesting at Western Libraries

Interlibrary loan is the process by which our library requests material from, or supplies material to, participating libraries worldwide. The purpose of interlibrary loan is to obtain, upon the request of our users, materials that are not available in our local collections, often at a cost that is significantly less than the cost of acquiring those resources for our own collection.

The Interlibrary Loan department at Western Libraries borrows and lends both articles and physical items such as books, CDs, or DVDs. The task of this working group was to come up with the average amount that we pay in order to obtain an article through interlibrary loan. An "ILL Article Transaction" is a request for a single article from a journal not subscribed to or held in any format at Western Libraries. Requests are initiated and processed via our interlibrary loan software (ILLiad), vetted for copyright and obtained directly from a document provider or requested from a lending library through ILL management systems such as RapidILL or OCLC.

Western Libraries staff work diligently to keep our ILL article costs low, while still providing prompt delivery. After software and management system costs, there are two ways an article can incur fees. The most common expense is a royalty fee. Generally, a library can request up to 5 articles in a calendar year from a single journal title without paying a royalty to the rights holder. This rule *only* applies to articles published in the last 5 years. Articles older than five years are not subject to this restriction. ILLiad software allows us to track when we will exceed 5 uses on journal titles for articles 5 years and newer, and allows us to compare the cost to pay a royalty versus the cost to obtain an article directly from a publisher or document provider.

The second type of expense occurs when we obtain an article from a library that charges fees for providing ILL services. To minimize this cost, Western participates in many reciprocal agreements. Most notably we are a member of LVIS – Libraries Very Interested in Sharing. With over 2,700 libraries participating in LVIS worldwide, the vast majority of our requests can be filled from a library that will not charge us fees. Additionally we are a member of RapidILL, an article-focused consortium that provides 24 hour delivery.

## Literature Review

Historically, the cost per transaction figure for an interlibrary loan request has been calculated by compiling the associated costs and dividing that by the number of transactions that are performed. This figure traditionally includes both borrowing and lending transactions as well as costs associated with shipping, staff salaries, etc. (ALA) This number was calculated by the Association of Research Libraries to be \$27 in 1991-1992, and \$26.77 in 2002 (Chambers; Jackson 31; van Dyk 83). However, our own analysis is concerned entirely with the cost of borrowing articles. Chambers and Jackson, in their presentations of the 1991 and 2002 cost studies calculated borrowing costs to be an average of \$18.00. However, their borrowing figures are 23 and 14 years old, respectively.

Cost per transaction has dropped over time as the costs of processing and shipping have declined due to the introduction of electronic publication and electronic delivery of articles. Not every article needs to be photocopied from a print journal, and almost none are delivered through traditional mailing methods. There does not seem to have been an official, comprehensive study done in the last decade that takes these technology advances into account (van Dyk, 88). However, in 2011 Lars Leon and Nancy Kress conducted a small cost study, and they concluded that the average borrowing cost for their sample size was \$9.62 (86).

### Factors in calculating ILL Article Transaction Costs for Western Libraries

The average cost for an ILL article request at Western Libraries has been calculated by dividing our total ILL expenditures by the number of article requests that have been filled. We did not include requests for articles that are open access, filled via our own subscriptions, or otherwise freely available online, nor did we include requests for book chapters.

Interlibrary loan expenditures were extracted from the University's accounting system and include:

- Subscription fees for interlibrary loan management systems (such as ILLiad, RapidILL, and OCLC Worldshare)
- One-time, single-use article purchases from document providers and publishers (GIN, SD, SIRC, National Library of Medicine)
- Lender fees (via invoice or IFM)
- Royalty fees

### Conclusion

After evaluating the factors described in the section above, we have found the average cost of an ILL article obtained at Western has been between \$8 and \$10 over the last 3 years. Data used in calculating these figures is available upon request.

Fiscal Year	13	14	15
Expenditure	\$88,828.25	\$78,274.88	\$75,751.76
# of Articles	10,494	8,027	7,558
Average Cost	<b>\$8.47</b>	<b>\$9.75</b>	<b>\$10.02</b>

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